DOCUMENT RESUME

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AUTHOR   Bogue-Feinour, Carole; And Others
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                Relationship; Flow Charts; *Governance; Methods;
                Organizational Objectives; Policy Formation; *Program
                Evaluation; Two Year Colleges; Worksheets
IDENTIFIERS   Canada College CA

ABSTRACT
                Designed to illustrate administrative structures and
processes at Canada College (CC), in Redwood City, California, this
report provides flow charts, sample worksheets, and explanatory
information related to college governance, program self-assessment,
and planning and budgeting. The first section, "College Governance
Model," provides an outline of the policy and procedures for academic
governance at CC, focusing on the college's governing philosophy and
purpose, a proposed college council, rules of meetings, clerical
support for the council, policy and procedure changes for the
council, scope of council decisions, and the process for
consideration of unresolved budgetary and planning issues. The next
section, "Internal Program Planning and Budgeting," provides flow
charts and planning worksheets for "Instruction Programs" and
"Student Services Programs," respectively. The materials presented
include flow charts describing the master planning process model and
the planning, budgeting and governance model; program review
worksheets for 1992-1993, used to define program philosophy, identify
the type of students to be served, and provide an assessment of the
previous year's goals; worksheets for program plans and objectives
for 1993-1996, for use in defining program goals and objectives,
plans for retention, goals for students and staff, and changes in
facilities, equipment, and curricula; a worksheet for budget
projections for 1992-1996; and a glossary of planning terms. The
section on student services features an additional glossary of
student services terminology. The final section provides flow charts
depicting governance and budgeting procedures, as well as lists of
general and long term goals for CC. (MAB)

Community College League
1992 Annual Convention

Together, Making a Difference

"College Governance, Program Self-Assessment, Planning and Budgeting"

Presented by

Carole Bogue-Feinour	**M. Douglas Kechter**
Vice President Instruction	President, Cañada College
Bruce Edmonds	**Grace Adams**
President, Faculty Senate	Dean, Business/Social Sciences Div.
Olivia Martinez	**David Eakin**
Vice President, Student Services	President, College Council
Debbie Clark	**Fermin Irigoyen**
President, Classified Council	District Student Trustee

BEST COPY AVAILABLE

Cañada College
Planning, Budgeting, and Governance

Planning Data
*External
*Internal

Vision

Opportunities   **Issues**

Priorities

College Goals

Available Funds
$ $ $

College Council

Collegewide Activities

= Annual Review

Program Planning

- Self Assessment
- Program Goals and Objectives
- Philosophy
- Students Served
- Enrollment Plans
- Budget Planning

*Staff   *Facilities   *Equipment   *Program

Instructional Student Services Programs

Program Activities

=

Facilities Plan

Equipment Plan

Staffing Plan

College Budgeting

- Division Budgets developed from priorities
- College Budget developed from Division Budgets, College Goals and Priorities
- Preliminary Budgets referred to all areas.

College Administration Activities

=

Budget Review and Recommendations

- Administration will review by area Proposed College Budget and how it relates to College Goals, Priorities, and Objectives.

College Council

Collegewide Activities

=

Program Review
Instruction/Student Services

College Council

Collegewide Activities

=

| Facilities Plan |

| Equipment Plan |

| Staffing Plan |

College Budgeting
- Division Budgets developed from priorities
- College Budget developed from Division Budgets, College Goals and Priorities
- Preliminary Budgets referred to all areas.

= **College Administration Activities**

Budget Review and Recommendations
- Administration will review by area Proposed College Budget and how it relates to College Goals, Priorities, and Objectives.

= **College Council**
Collegewide Activities

Program Review
Instruction/Student Services

= **College Council**
Collegewide Activities

Cañada College
Planning, Budgeting, and Governance

Planning Data			
*External			
*Internal			

Vision

Opportunities **Issues**

Priorities

Available Funds **College Goals**
$ $ $

College Council

Collegewide Activities

= Annual Review

Program Planning

* Self Assessment
* Program Goals and Objectives
* Philosophy
* Students Served
* Enrollment Plans
* Budget Planning

*Staff   *Facilities   *Equipment   *Program

Instructional Student Services Programs

Program Activities

=

CAÑADA COLLEGE
Long-Term Goals - (3-5 Years)

Transfer

Increase the number of students who transfer. Recruit
and improve transfer rate of under-represented students.

Retention

Increase the number of units students complete.

Technology

Implement changeover in computing software and hardware
in keeping with the District ITS plan.

Facilities/Equipment

Plan for building maintenance and equipment replacement.

Diversity

Increase sensitivity of campus community (administration,
faculty and staff) to changing student needs.

Outreach

Expand weekend college courses.
Develop a functioning Alumni Association.

Planning/Budgeting

Maintain stable budget planning process and keep college
community informed.
Maintain college budget planning accountability.
Continue to develop and refine a collegewide model for
Program Review and continuous planning.

Innovation

Develop a child care plan for children of Cañada College
students.
Implement Learning Skills Center.

Resources/Linkages

Continue to explore entrepreneurial opportunities:
- Grants
- Partnerships
- Contracts
- Foundations
Develop community-based programs using redevelopment funds.

Diversity

12. Improve campuswide cultural awareness in programs.

13. Implement an outreach plan to under-represented populations of students.

Technology

14. Implement changeover in computing software and hardware in keeping with the District ITS plan.

CANADA COLLEGE
Goal Statements - 1992/93

Governance

1. Continue to develop and refine a shared governance model
    - including a College Council.

2. Improve communication, College team building and unity.

Staff Development

3. Focus Staff Development funds on institutional priorities
    of teaching, learning and student success.

Resources/Linkages

4. Explore and develop entrepreneurial opportunities through
    increased contract classes, foundation and grant
    applications and partnerships with business and industry.

5. Implement plans for Menlo Park Redevelopment Project.

Retention

6. Develop a plan for the implementation of a comprehensive
    student services and instructional support system for
    underprepared and under-represented students including
    child care.

Planning

7. Continue to implement and refine models for effective
    strategic planning and budgeting, incorporating
    accountability and the use of data to make decisions on
    resource allocations.

8. Develop a Collegewide, comprehensive Program Review model
    in keeping with Districtwide guidelines.

9. Develop Collegewide consensus of program priorities guided
    by stated mission goals and Vision 2000.

Innovation

10. Continue to plan, develop and implement a College Learning
    Skills Center incorporating tutorial services and faculty
    participation.

11. Use VATEA funding to plan, develop and implement a Job
    Placement Center.

Information Systems

Continue to provide data and information for institutional planning.

Staff Development

Continue to define Staff Development for College faculty, staff, and administrators.
Develop a goal or theme for Staff Development.

College Governance
Development of a College Council

Governing Council/the Academic Senate

Curriculum Committee

Professional Personnel Committee

Student Services Committee

Shared Governance Committee
1 - Humanities
1 - Basic & Applied Sciences
1 - Business/Social Sciences
1 - Student Services
1 - Adjunct Faculty

College Council Membership
(Faculty Chair)
5 - Faculty (shared Governance Committee)
3 - Classified Staff
2 - Students
2 - Administrators
   (College President ex-officio)

1 ∩

Instruction
Division/Department Planning Budgeting Process

Planning Compendium

A. External Factors

- Demographics
- Business/Industry
- Location
- Local Economy
- New Fee Structure
- Feeder Schools

B. Internal Factors

- Assessment of Previous Year's Goals
- Previous Year's Expenditures
- Student Data
- Program Data
- Enrollment
- FTE
- Load
- WSCH

The Document: Final Draft

Business/Social Sciences
Basic & Applied Sciences/P.E.
Humanities
- Submit to VP Instruction
- Ranked Lists From All Divisions
  Combined To Become The List For
  Instruction
- Documents From All Divisions Are
  Combined To Become The Docu-
  ment For Instruction

Discipline/Department Level

- Review Previous Goals
- Develop Philosophy Statement
- Identify Students to be Served
- Project Change/Growth Students/
  Curriculum
- Project Equipment Needs
- Project Budget Needs
- Project Facility Needs
- Establish New Goals/Objectives

Planning Compendium

A. External Factors
  - Demographics
  - Business/Industry
  - Location
  - Local Economy
  - New Fee Structure
  - Feeder Schools

B. Internal Factors
  - Assessment of Previous Year's Goals
  - Previous Year's Expenditures
  - Student Data
  - Program Data
  - Enrollment
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CANADA COLLEGE
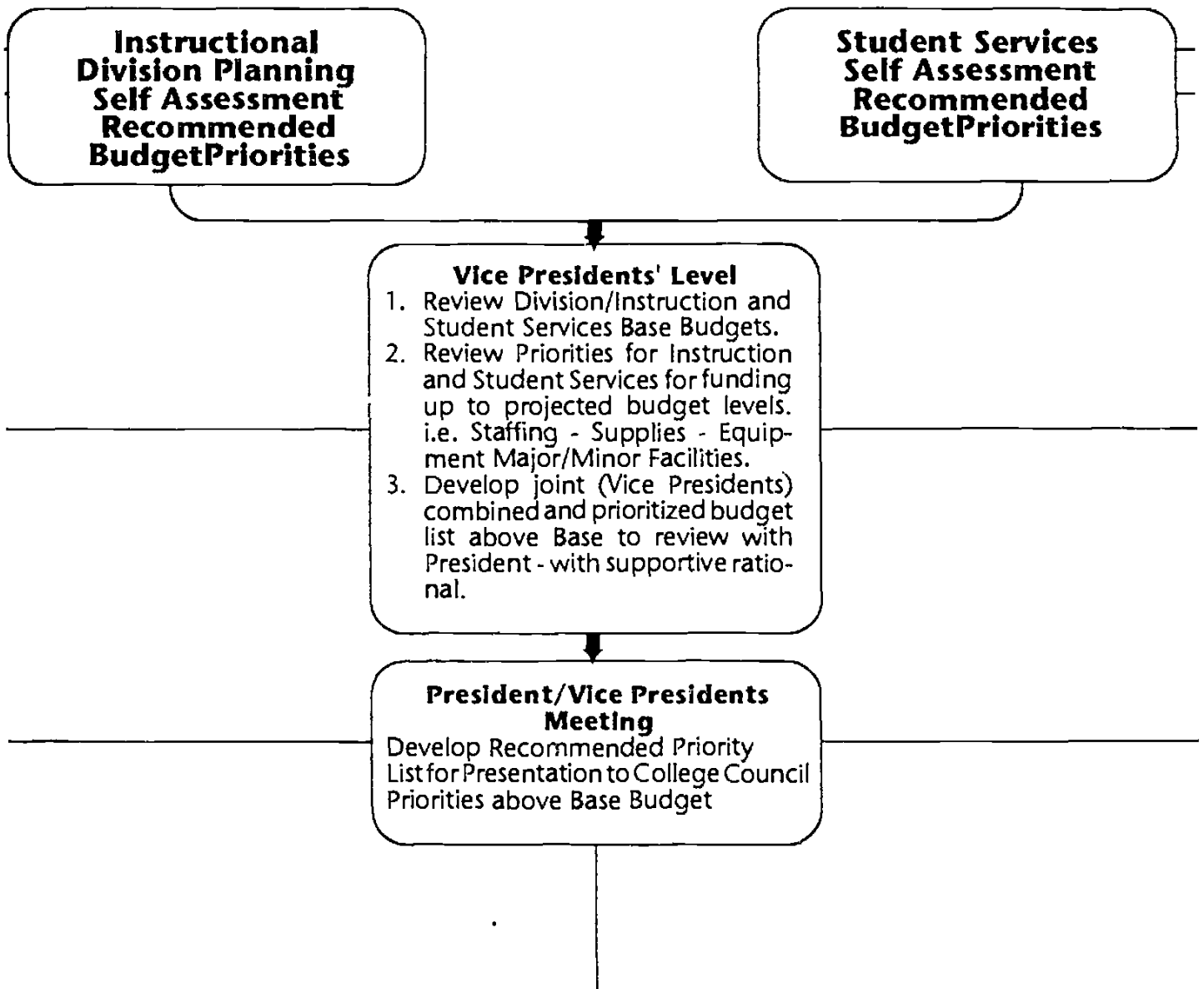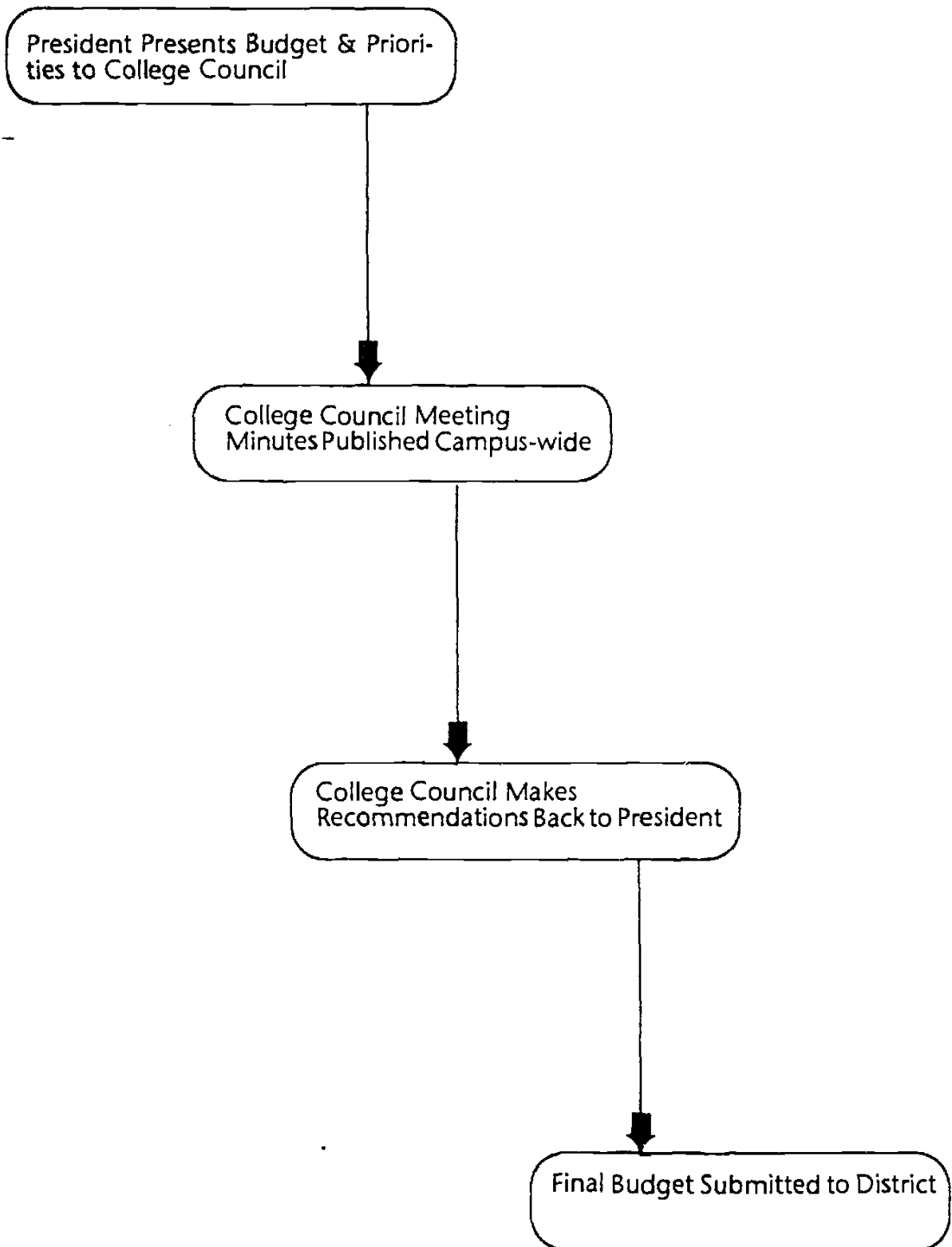SINCE 1968
REDWOOD CITY

Planning and Budgeting
Vice Presidents' Level

**Instructional
Division Planning
Self Assessment
Recommended
BudgetPriorities**

**Student Services
Self Assessment
Recommended
BudgetPriorities**

Vice Presidents' Level
1. Review Division/Instruction and Student Services Base Budgets.
2. Review Priorities for Instruction and Student Services for funding up to projected budget levels. i.e. Staffing - Supplies - Equipment Major/Minor Facilities.
3. Develop joint (Vice Presidents) combined and prioritized budget list above Base to review with President - with supportive rational.

President/Vice Presidents Meeting
Develop Recommended Priority List for Presentation to College Council Priorities above Base Budget

College Council Meeting
Minutes Published Campus-wide

President Presents Budget & Priorities to College Council

College Council Makes Recommendations Back to President

Final Budget Submitted to District

```
┌─────────────────────┐          ┌─────────────────────┐
│    Instructional    │          │  Student Services   │
│ Division Planning   │          │  Self Assessment    │
│  Self Assessment    │          │    Recommended      │
│    Recommended      │          │  BudgetPriorities   │
│  BudgetPriorities   │          │                     │
└─────────────────────┘          └─────────────────────┘
           │                                │
           └────────────────┬───────────────┘
                            ▼
        ┌──────────────────────────────────────┐
        │         Vice Presidents' Level        │
        │ 1. Review Division/Instruction and    │
        │    Student Services Base Budgets.     │
        │ 2. Review Priorities for Instruction  │
        │    and Student Services for funding   │
        │    up to projected budget levels.     │
        │    i.e. Staffing - Supplies - Equip-  │
        │    ment Major/Minor Facilities.       │
        │ 3. Develop joint (Vice Presidents)    │
        │    combined and prioritized budget    │
        │    list above Base to review with     │
        │    President - with supportive ratio- │
        │    nal.                               │
        └──────────────────────────────────────┘
                            ▼
        ┌──────────────────────────────────────┐
        │     President/Vice Presidents         │
        │              Meeting                  │
        │ Develop Recommended Priority          │
        │ List for Presentation to College Council │
        │ Priorities above Base Budget          │
        └──────────────────────────────────────┘
                            │
                            │
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President Presents Budget & Priori-
ties to College Council

College Council Meeting
Minutes Published Campus-wide

College Council Makes
Recommendations Back to President

Final Budget Submitted to District

15

Any instrument that attempts to evaluate Student Services must take into account the qualitative aspects of Student Services. It is not appropriate to evaluate Student Services programs on the basis of Weekly Student Contact Hours or FTE. Therefore, we have modified the document to include evaluation indicators for each of our objectives. Furthermore, most Student Services programs by virtue of their categorical funding undergo program reviews by the Chancellor's Office in Sacramento. Provisions should be made to incorporate findings from these reviews as well. As the state accountability model is implemented, this instrument may need further modification. Dynamic assessment is essential for any attempt to review student services programs.

CollegeCouncil Budget Reviews and Recommendations

CAÑADA COLLEGE
ROUTINE BUDGET/PLANNING PROCESS

College Goals + Data & Information

Department Plan/Process
+
Recommended Budget in Priority Order

Division Deans + Faculty
Plan +
Recommended Budget in Priority Order

Vice Presidents + Deans
Instruction/Student Services Plan +
Recommended Budget in Priority Order

President + Vice Presidents
College-wide Plan +
Recommended Budget in Priority Order

College Council
Review of Budget Plan & Priorities
Recommendation back to President

Final College-wide Plan +
Budget in Priority Order

CAÑADA COLLEGE COUNCIL

Process for Resolution of Budget/Planning Issues

___ .Additional Department/Program Discussion
(facts, reasons, rationale, why, solution recommended)

Dean Discussion ——————— Resolution

No resolution

Vice President + Deans + Department ——— Resolution

No resolution

President + Vice President + Deans + Department � Resolution

No resolution

College Council

Recommendation to President
with Alternatives & Possible Solution

President makes Decision

Cañada College

*Community College League
1992 Annual Convention*

College Governance,
Program Self-Assessment,
Planning and Budgeting

Fall 1992

Cañada College Presentation
for
Community College League
1992 Annual Convention

Introduction...Carole Bogue-Feinour
Vice President, Instruction

Over-View, Planning and Budgeting...................M. Douglas Kechter
President, Cañada College

Governance Model..Bruce Edmonds
President, Faculty Senate

Review Instruction Div/Dept Process....................Grace Adams
Dean, Business/Social Sciences Division

Review Student Services Model.............................Olivia Martinez
Vice President, Student Services

College Council Role/Review..................................David Eakin
President, College Council

Classified Council Role/Review...............................Debbie Clark
President, Classified Council

Student Government Role/Review...........................Fermin Irigoyen
District Student Trustee

CAÑADA COLLEGE
SINCE 1968
REDWOOD CITY

Cañada College

College Governance Model

Revised
June 1992

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C A Ñ A D A   C O L L E G E

POLICY AND PROCEDURES

I.   PHILOSOPHY

Shared governance is a decision-making process committed to the best interests of our students and our institution based upon participation of those affected by decisions in an environment of cooperation and trust.

II. PURPOSE

One of the basic principles of academic governance in higher education is that effective decisions derive not only from the powers vested in governing boards and colleges by law, but also from the knowledge and experience possessed by the faculty, administration, staff and students. Because both sources of information are vital to the development and implementation of sound educational policy, Cañada College wishes to encourage to the greatest extent possible the practice of shared governance. Shared governance recognizes and indeed is predicated on the sincere commitment on the part of all participants to our students, our professions and to our institution. It is a complex process of consultation that demands from faculty, administrators, classified staff and students a respect for divergent opinions, a sense of mutual trust and a willingness to work together for the good of the instructional enterprise. Shared governance embraces the basic objective that all key parties of interest should be given the opportunity to participate in jointly developing recommendations and priorities for the well-being of the institution.

III. PROPOSED COLLEGE COUNCIL

A.   Composition

Faculty
   Full-Time (one from each of the four divisions)   4
   Adjunct   1
Classified   3
Students   2
Administrative   2
President (ex-officio, non-voting, non-presiding)

B.   The College Council is advisory to the College President.

C.   Selection

Each organization will appoint its members in consultation with the President.

The Faculty Senate will appoint adjunct faculty.

D.   Term

1.   Terms will be for two years (August-June) except for initial appointments and any mid-term replacements, which will result in staggered terms, and for any ex-officio appointments which will reflect current office holders whatever their position terms of office may be. Appointments will be made by June preceding the term of appointment.

2.   Student terms will be for one year August 15- June 30) with appointments made in June.

E.   Chair

The Council will select its chair annually at the last meeting in June to serve the following year. The chair will be selected from the faculty.

IV. MEETINGS

A.   Rules of Procedure for Conduct of Meetings

1.   Consensus Method

The Consensus Method (general agreement of opinion based on reports, data and information present; judgement arrived at theory discussion and agreement). In the event that consensus cannot be reached, Robert's Rules of Order will be followed in reaching a recommendation.

a.   Robert's Rules of Order
b.   Decision

2.   Quorum

a.   A quorum must be present to hold a meeting. For this purpose a quorum is defined as 50% plus one (1) of the Council's voting members.

3. Decisions

   a. Decisions will be made by consensus. If con-
   sensus is not reached after three presentations,
   a motion will be made, seconded and passed by
   the majority of voting members in attendance.
   Tied votes fail.

B. Actions

The College has established a College Council to insure
faculty, staff and students the right to participate
effectively in college governance.

All actions of the committee will be forwarded to
the President in the form of a recommendation. The
President will rely upon the advice and judgement
of the College Council.

C. Agenda

   1. Distribution

   Agenda packets will be distributed by the
   President's Office one (1) week in advance of
   meetings to the Chair of the Academic Senate,
   Classified Council, Associated Student Senate
   and adjunct faculty.

   The College President and the College Council
   Chair will be responsible for developing and
   approving College Council agendas. Council
   members may request that an item be included
   on the agenda by completing the agenda item
   request form. The President and Chair will review
   with Council all requests not approved for
   agendas. The Council may decide by consensus
   to include items on a future agenda not approved
   by the President and College Council Chair.

V. CLERICAL SUPPORT

The Executive Secretary to the President will provide
clerical support to the Council to include attending all
meetings to take minutes, preparing and distributing agendas
and providing associated assistance to the chair of the
Council.

VI. POLICY AND PROCEDURE CHANGES

A. Any member of the Council may request a rule change.

B.   The initial presentation/discussion would constitute
     "first reading." A "second reading" would occur at
     the next meeting of the Council and the proposed rule
     change would appear on the agenda as a discussion
     item.

     If all members of the Council are present, a vote
     may be taken. If all members are not present,
     consideration of the item will appear on the agenda
     of the next meeting for a "third reading" and action.
     Following the third reading, the issue can be voted
     on with a quorum present.

VII. SCOPE

     A.   The scope of the Council shall be:

          1.   Proposed College/District policy changes

          2.   College planning and budget

               a.   Facilities and equipment planning

                    (1) building and equipment
                    (2) maintenance and operations

               b.   Institutional Planning

                    (1) program review: long-range planning
                    (2) budget review and recommendations
                         for prioritizing funding: short and
                         long-range planning
                    (3) institutional staffing: impact on budget
                         of organizational growth/reduction
                         (certificated, classified, hourly)

               c.   College Master Planning

                    (1) Review and recommendation of college
                         direction and emphasis

          3.   Accreditation review with faculty Liaison Officer

     B.   In the event that a department/discipline has not
          received, in their judgement, a proper consideration
          for its requests/recommendations, the following
          procedure will be used by the College Council to
          consider unresolved Budget, Policy, and Planning
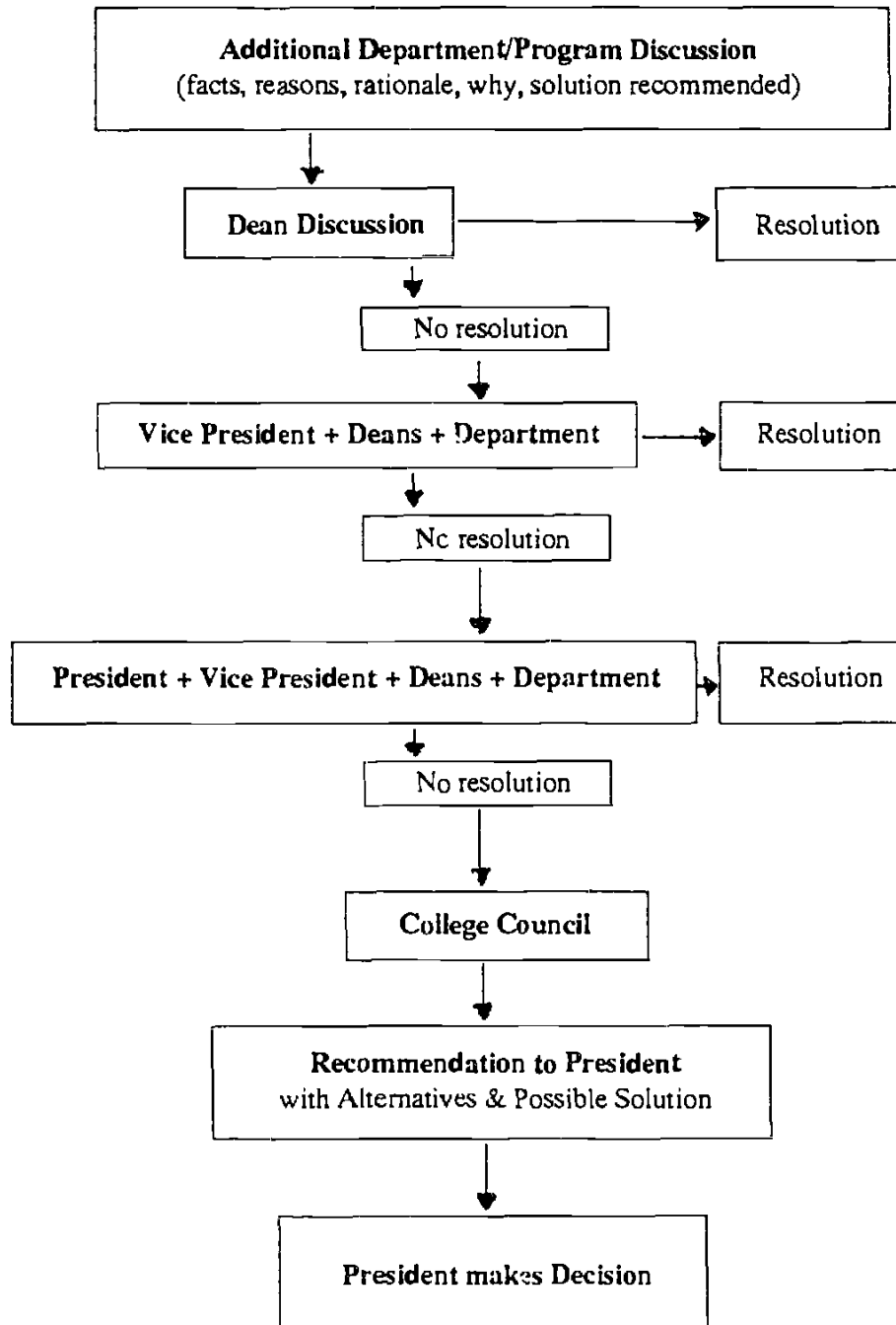   issues.

CAÑADA COLLEGE COUNCIL

Process for Consideration of
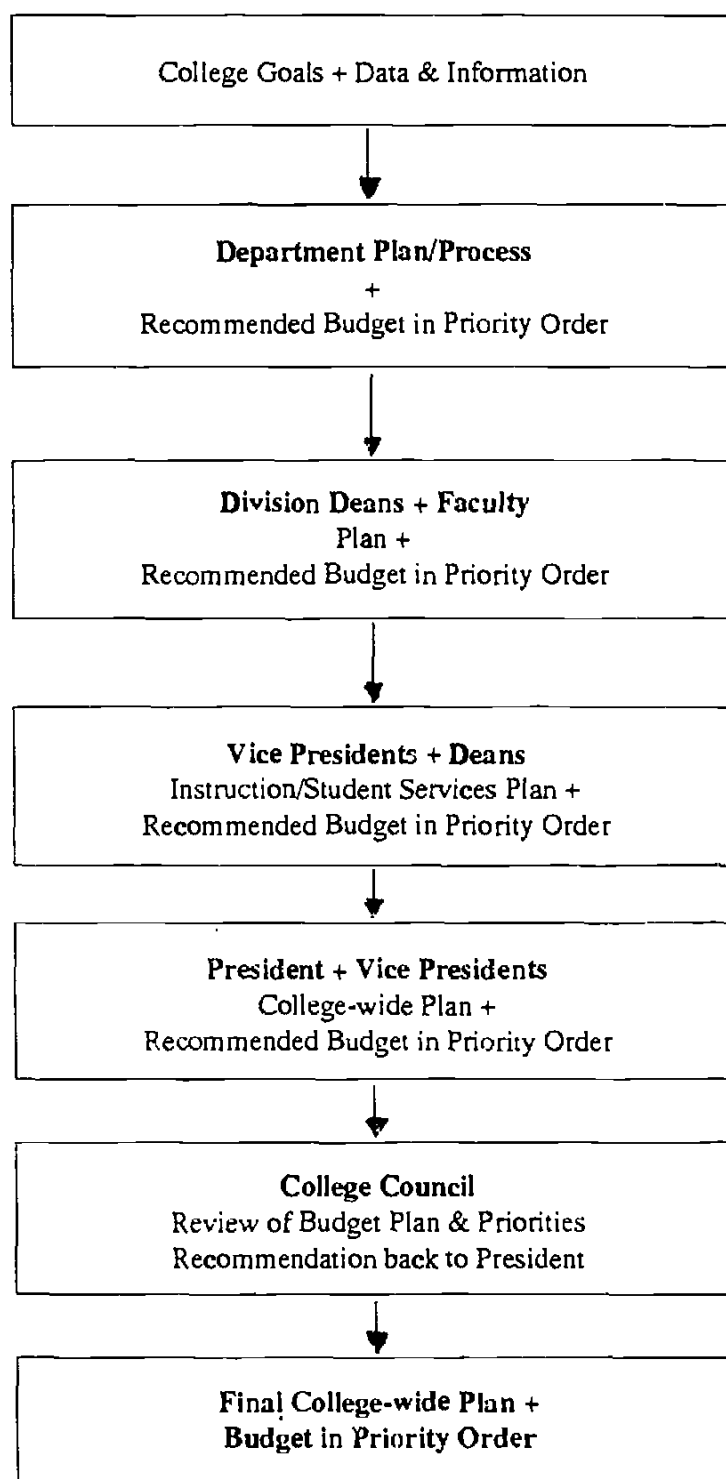Unresolved Budget/Planning Issues

A. Time Limit for Discussion

    1. Limit of 15-minute presentations for each depart-
        ment/discipline and administrative presentation
        (30-minute total).

B. Supporting materials to be sent to College Council at
    least one week in advance of meeting.

C. Presentation: Two Reports

    1. President & Administrators

    2. Department + Program

    3. Reports to College Council will address the
        following (from both President/Administrators/
        Departments):

        a. Stated Request
        b. Facts
        c. Rationale
        d. Effect
        e. Recommendation and any Alternatives
        f. Additional Material

D. No decision is made at the time of the presentation.

E. Next meeting, the issue will be on the agenda for
    discussion, recommendation, and response back to
    the department with a solution.

CAÑADA COLLEGE COUNCIL

Process for Assisting to Resolve Budget/Planning Issues

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┌─────────────────────────────────────────────────────┐
│         Additional Department/Program Discussion       │
│  (facts, reasons, rationale, why, solution recommended)│
└─────────────────────────────────────────────────────┘
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              ┌──────────────────┐          ┌──────────────┐
              │  Dean Discussion  │ ───────▶ │  Resolution  │
              └──────────────────┘          └──────────────┘
                          │
                          ▼
                  ┌──────────────┐
                  │ No resolution │
                  └──────────────┘
                          │
                          ▼
        ┌────────────────────────────────────┐   ┌──────────────┐
        │ Vice President + Deans + Department  │ ─▶│  Resolution  │
        └────────────────────────────────────┘   └──────────────┘
                          │
                          ▼
                  ┌──────────────┐
                  │ Nc resolution │
                  └──────────────┘
                          │
                          ▼
  ┌──────────────────────────────────────────────────┐  ┌──────────────┐
  │ President + Vice President + Deans + Department     │ ▶│  Resolution  │
  └──────────────────────────────────────────────────┘  └──────────────┘
                          │
                          ▼
                  ┌──────────────┐
                  │ No resolution │
                  └──────────────┘
                          │
                          ▼
                  ┌──────────────┐
                  │ College Council │
                  └──────────────┘
                          │
                          ▼
        ┌────────────────────────────────────┐
        │     Recommendation to President       │
        │  with Alternatives & Possible Solution │
        └────────────────────────────────────┘
                          │
                          ▼
              ┌──────────────────────────┐
              │  President makes Decision  │
              └──────────────────────────┘
```

CAÑADA COLLEGE
ROUTINE BUDGET/PLANNING PROCESS

College Goals + Data & Information

↓

Department Plan/Process
+
Recommended Budget in Priority Order

↓

Division Deans + Faculty
Plan +
Recommended Budget in Priority Order

↓

Vice Presidents + Deans
Instruction/Student Services Plan +
Recommended Budget in Priority Order

↓

President + Vice Presidents
College-wide Plan +
Recommended Budget in Priority Order

↓

College Council
Review of Budget Plan & Priorities
Recommendation back to President

↓

Final College-wide Plan +
Budget in Priority Order

Cañada College

Internal Program Planning and Budgeting

Instruction Programs

Fall 1992

INTERNAL PROGRAM PLANNING, AND BUDGETING

CAÑADA COLLEGE

TABLE OF CONTENTS

Cañada College
Master Planning Process

Cañada College
Planning, Budgeting, and Governance

Planning Data
*External
*Internal

Available Funds
$ $ $

Vision

Opportunities | **Issues**

Priorities

College Goals

College Council

Collegewide
Activities

= Annual Review

Program Planning

* Self Assessment
* Program Goals and Objectives
* Philosophy
* Students Served
* Enrollment Plans
* Budget Planning

*Staff *Facilities *Equipment *Program

**Instructional
Student
Services
Programs**

Program
Activities

**Facilities
Plan**

**Equipment
Plan**

**Staffing
Plan**

College Budgeting

* Division Budgets developed
  from priorities
* College Budget developed
  from Division Budgets.
  College Goals and Priorities
* Preliminary Budgets
  referred to all areas.

= **College
Administration
Activities**

Budget Review and Recommendations

* Administration will
  review by area Proposed
  College Budget and how
  it relates to College
  Goals, Priorities, and
  Objectives.

College Council

Collegewide
Activities

**Program Review
Instruction/Student Services**

College Council

Collegewide
Activities

Cañada College
PROGRAM REVIEW & BUDGETING
M O D E L

External
Assessment

Program & Budget Planning

Goals & Planning Objectives

Disciplines/ Programs

Program Philosophy Statement

Division Dean

Division Plan and Budget

Internal Assessment

Division Dean

Vice President

President

College Council

- Educational Plan
- Student Services Plan
- Staffing Plan
- Equipment Plan
- Facilities Plan

Master Planning
* Issues
* Opportunities
* Vision
* Program Data

College Budget

PROGRAM REVIEW WORKSHEETS

I. PROGRAM REVIEW WORKSHEETS 1992-93

A. PROGRAM PHILOSOPHY:

_____

_____

_____

_____

_____

_____

B. STUDENTS TO BE SERVED:

Description of students (age, ethnicity, etc.); needs of students;
present description of students; future profile of students.

_____

_____

_____

_____

_____

_____

C. ASSESSMENT OF PREVIOUS YEAR'S GOALS AND OBJECTIVES.

_____

_____

_____

_____

_____

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_____

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_____

_____

_____

_____

_____

_____

_____

PLANS FOR 1993-1996

4   30

CAÑADA COLLEGE 1993-94

II.   PROGRAM PLANS AND OBJECTIVES

A. GOALS AND OBJECTIVES:

1. Goal:_____

_____

a. Objective:_____

_____

b. Objective:_____

_____

2. Goal:_____

_____

a. Objective:_____

_____

b. Objective:_____

_____

3.

3. Goal:_____

_____

   a. Objective:_____

_____

   b. Objective:_____

_____

4. Goal:_____

_____

   a. Objective:_____

_____

   b. Objective:_____

_____

5. Goal:_____

_____

   a. Objective:_____

_____

   b. Objective:_____

_____

6

B. PLANS FOR RETENTION

1. Goal:_____

_____

   a. Objective:_____

_____

   b. Objective:_____

_____

2. Goal:_____

_____

   a. Objective:_____

_____

   b. Objective:_____

_____

3. Goal:_____

_____

   a. Objective:_____

_____

   b. Objective:_____

_____

7

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C. GOALS FOR STUDENTS

Based on previously identified changes in programs/services to be offered, what is your goal for the number of student enrollments you will be serving in the upcoming years? (Estimate for Fall Semester only)

	Estimate Number of Enrollments	Load WSCH/FTE
Students Served in Fall 1991 (Actual)	_____	_____
Students Expected to Serve this Fall 1992	_____	_____
Students To Be Served: Goal for Fall 1993	_____	_____
Fall 1994	_____	_____
Fall 1995	_____	_____

D. GOALS FOR STAFF

How many FTE staff members do you feel you will need to conduct your planned program in the next few years? (number for total academic year including summer)

Indicate number of FTE's for full year

	Current 1992-93	1993-94	1994-95	1995-96
Faculty: Full-time	_____	_____	_____	_____
Part-time	_____	_____	_____	_____
Classified Permanent	_____	_____	_____	_____
Classified Hourly	_____	_____	_____	_____
Management/ Administration	_____	_____	_____	_____
Coordination Time	_____	_____	_____	_____
Other Reassigned Time	_____	_____	_____	_____
Total FTE	_____	_____	_____	_____
Probable Retirements	_____	_____	_____	_____

8

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E. FACILITIES, EQUIPMENT, AND CURRICULUM

Based on previously identified changes in programs/services to be offered and/or students to be served, will you have specific facility needs/changes in the next few years? Please list and indicate with an "X" the year needed. On a separate, attached page, please indicate, in priority order, specific plan including diagrams and estimate of the cost.

Facility Changes	Program	1993-94	1994-95	1995-96

Based on the previously identified changes in programs/services to be offered and/or students to be served, what do you anticipate will be major equipment expenditures in the upcoming years? List, in priority order, the new equipment needed as part of any facility changes.

Equipment	Program	1993-94	1994-95	1995-96

List any changes in curriculum you anticipate in the coming years, noting on a separate narrative page whether they are in General Education, majors requirements or special offerings, and whether an increase in numbers of class sections is indicated, and in which classes.

Curriculum	Program	1993-94	1994-95	1995-96

III. PROJECTED BUDGET

Based on your previously identified changes in programs, services, staff, etc., what do you anticipate your unit budget needs will be over the next few years?

Object Code	Current Budget 1992-93	Proposed Budget 1993-94	Proposed Budget 1994-95	Proposed Budget 1995-96
1000 Faculty Total FTE				
2000 Classified Total FTE				
3000 Employee Benefits	N/A	N/A	N/A	N/A
4000 Books/ Supplies/ Equipment				
5000 Other Operational Expenses				
6000 Capital Outlay				
7000 Other				

10   4 ?

GLOSSARY

1. **Program Review** - to assess an institutional program, considering the results of internal and external assessments that can be used for planning and determining needs.

2. **Internal Assessment** - qualitative and quantitative evaluation of a program, considering such items as enrollments, budget, facilities, equipment, and relationship to other programs, college mission, and vision.

3. **Philosophy Statement** - established values, beliefs, and guidelines for the manner in which the program is going to conduct its business. Why do we exist? What is the relationship to college vision/mission?

4. **Long-Range Goals** - the results desired in pursuing the philosophy statement that extend beyond the current fiscal year.

5. **Short-Range Goals** - performance targets, normally not more than one year's duration, that can be used to measure progress toward the achievement of long-range objectives.

6. **Objectives** - measurable activities to achieve desired goals.

7. **External Assessment** - evaluation of influences which affect the program from outside the division, college, district, etc.; i.e., local demographics, industries, schools; economic, technological, and political forces; needs of students, competition, resources, etc.

8. **Issue** - a barrier to a program in meeting its goals; a problem that needs to be resolved.

9. **Opportunities** - conditions in the college environment (external or internal) by which the college may profit; preface opportunity statements with, "We have..."

10. **FTE** - full-time teaching equivalency (15 FLC per semester/30 FLC per year).

11. **Income Generation**

    A. Definition of WSCH, Weekly Student Contact Hours

    1. For a given full semester class, WSCH equals the number of students in the class times the number of hours per week the class meets.

    Example

    If 40 students are enrolled in a History course which meets 3 hours per week, the WSCH for that class would be:

    $$40 \times 3 = 120 \text{ WSCH}.$$

2. For an instructor, WSCH equals the sum of the WSCHs for all his/her classes.

<u>Example</u>

The same instructor who taught the History course above also teaches three other sections of History, all of which meet three hours per week, with enrollments of 35, 40, and 45 and Honors Political Science course with 20 students which meets 3 hours per week. The instructor's WSCH would be calculated as follows:

$$
\begin{array}{llll}
\text{Section 1} & 40 \times 3 & = & 120 \\
\text{Section 2} & 35 \times 3 & = & 105 \\
\text{Section 3} & 40 \times 3 & = & 120 \\
\text{Section 4} & 45 \times 3 & = & 135 \\
\text{Section 5} & 20 \times 3 & = & \underline{60}
\end{array}
$$

<u>TOTAL WSCH</u>   = <u>540</u>

3. For a division, the WSCH equals the sum of all WSCHs for each course in the division.

4. Positive attendance accounting is not given in this document.

B. <u>Definition of FTE (Full-Time Equivalent)</u>

This term refers to <u>faculty</u>; there are also full-time equivalent students referred to as FTES (California is in the process of adopting this nomenclature).

1. As applied to full-time faculty, one full-time faculty member is assumed to carry 15
· FLCs (faculty load credits) per semester. Normally, one thinks of such a load as teaching five, three-unit classes; however, any method to arrive at 15 FLCs is valid. In some science disciplines where a course carries 7.5 FLCs, conceivably an instructor could teach two courses and still be full time since $2 \times 7.5 = 15$ FLCs.

2. As applied to part-time faculty, the part-timer's FTE is computed by comparing his/her FLCs to 15. Thus, a part-timer teaching 6 FLC units would be 6/15 FTE, which expressed in decimals is .40 FTE.

3. As applied to a department, a department's FTE would be the sum of the FTE for each faculty in the department.

<u>Example</u>

A department is composed of 4 full-time faulty, 3 part-timers who teach 3 units, 1 part-timer who teaches 6 units, and 1 who teaches 9 units. The department's FTE would be calculated as follows:

$$
\begin{array}{lll}
\text{3 part-timers x 3/15} & = & \text{.60 FTE} \\
\text{1 part-timer x 6/15} & = & \text{.40 FTE} \\
\text{1 part-timer x 9/15} & = & \text{.60 FTE} \\
\text{4 full-timers} & = & \underline{\text{4.00 FTE}}
\end{array}
$$

Total FTE   <u>5.60 FTE</u>

4. For a division, FTE equals the sum of the FTEs for each department within the division.

C. Definition and Interpretation of WSCH/FTE

WSCH/FTE is a ratio comparing weekly student contact hours generated to full-time faculty necessary to generate that WSCH. This ratio is referred to as load.

Example

The department in the previous example is found to have generated 2800 WSCH. It has 5.60 FTE faculty. Therefore:

$$WSCH/FTE = 2800 \div 5.60 = \underline{500}$$

12. Expenditures

A. Salary Costs

Most of the time when we refer to the cost of a class we are referring only to the instructor's salary; i.e., salary cost. Most income-expense ratios in fact compare ADA income to salary cost. However, there are many other costs that one must consider when analyzing whether or not income balances expense.

B. Direct Support Costs

Direct support costs include those costs directly supporting the instructor or the instructor's activity in the classroom: e.g., employee benefits, instructional aides/lab assistants, supplies, equipment, printing and duplicating costs, paid guest lecturers, field trip transportation, repair contracts, or minor remodeling. These costs can clearly be shown to be unique to the class or department in question.

C. Other Direct Costs

Other direct costs are those associated directly with the programs within in a division but which cannot be ascribed to any one course or department within the division: e.g., Division Dean's salary; salaries of secretarial staff; benefits for both; and any supplies, equipment, or services provided on a centralized basis for shared use by individual faculty or departments within a division.

D. Total Direct Costs

The sum of all of the above costs represents the total direct costs for a division (salary, direct support, other direct).

E. Indirect Support Costs

All other costs in the district are considered indirect costs or overhead; for example:

1. Campus indirect costs: examples include library/media, President's and Vice Presidents' salaries, counseling, admissions and records, buildings, grounds, payroll, public information, publicity, utilities (heat, light, water).

2. District indirect costs: examples include District office administrative and classified salaries and benefits, ITS.

F. Total Program Costs

The total cost for any program is the sum of its direct and indirect costs. A rule of thumb for estimating total costs is to double the direct costs, being sure to include fringe benefits as part of the direct costs. For programs that have relatively high direct costs by virtue of being heavily dependent on supplies, equipment, classified staff, etc., a doubling of direct costs may overstate their total cost. For programs that have relatively low direct costs by virtue of having few full-time staff and minimum requirements for supplies and equipment, a doubling of direct costs may understate their total cost.

G. Income Expense Ratio

From the above analysis, it can be concluded that for a program to support itself, or "break even," its ADA revenue should be about twice its direct costs. While some programs may have a higher ADA income to direct expense ratio than others, the overall balance for all ADA generating programs in the college should be an income to expense ratio of about 2 to 1.

Cañada College

Internal Program Planning and Budgeting

Student Services Programs

Fall 1992

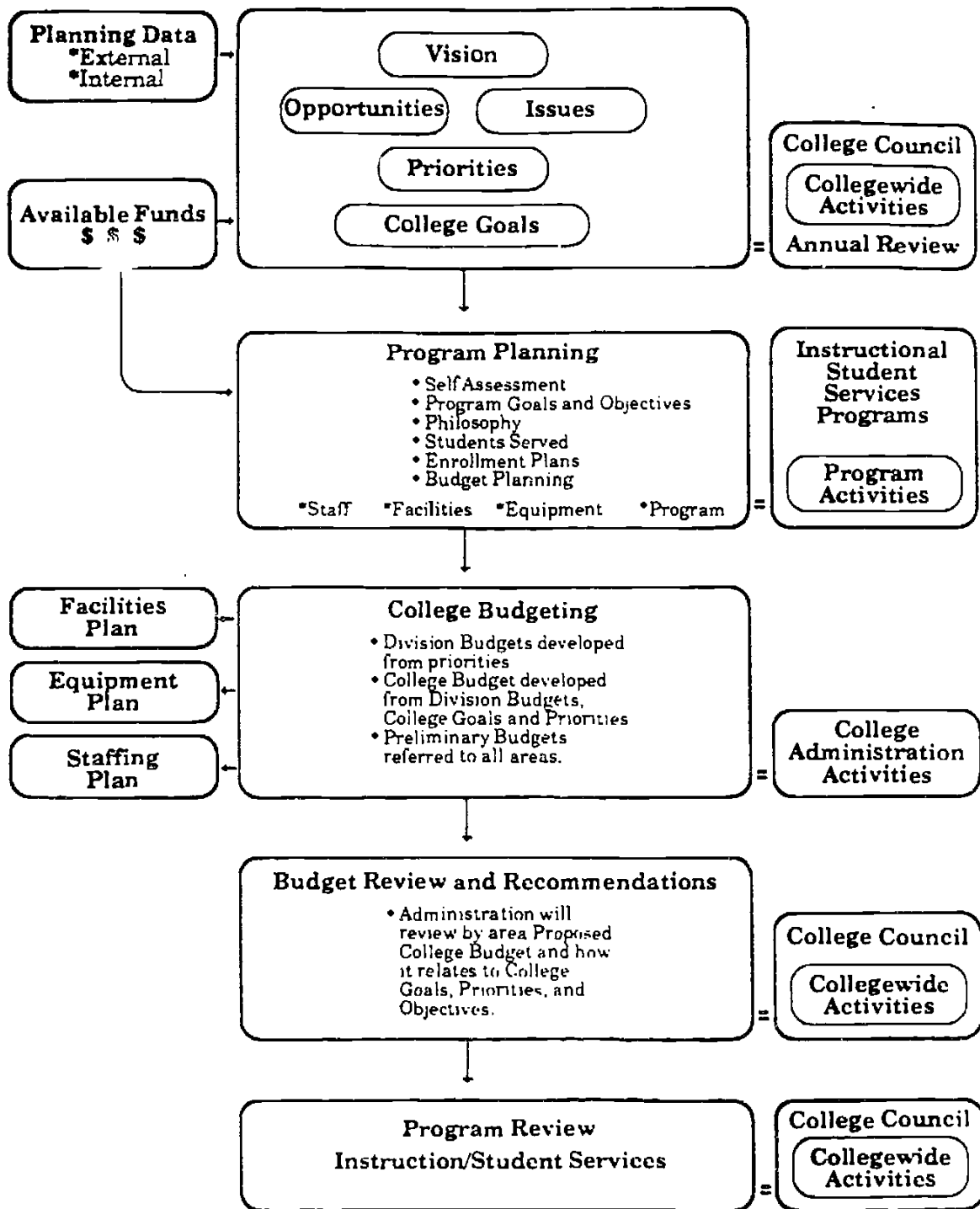# INTERNAL PROGRAM PLANNING, AND BUDGETING

CAÑADA COLLEGE

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(Collegewide Activities)
= Annual Review

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* Program Goals and Objectives
* Philosophy
* Students Served
* Enrollment Plans
* Budget Planning
*Staff *Facilities *Equipment *Program

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College Council
(Collegewide Activities)
=

Program Review
Instruction/Student Services

College Council
(Collegewide Activities)
=

Cañada College
PROGRAM REVIEW & BUDGETING
M O D E L

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                                                                    │Assessment│
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       │                                                         │
       └─────────────────────────────────────────────────────────┘
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PROGRAM REVIEW WORKSHEETS

I. PROGRAM REVIEW WORKSHEETS 1992-93

A.   PROGRAM PHILOSOPHY:

_____

_____

_____

_____

_____

_____

_____

B.   STUDENTS TO BE SERVED:

Description of students (age, ethnicity, etc.); needs of students; present description of students; future profile of students.

_____

_____

_____

_____

_____

_____

C. ASSESSMENT OF PREVIOUS YEAR'S GOALS AND OBJECTIVES.

_____

_____

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_____

_____

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PLANS FOR 1993-1996

4

CAÑADA COLLEGE 1993-94

II. PROGRAM PLANS AND OBJECTIVES

A. GOALS AND OBJECTIVES:

1. Goal:_____

   _____

   a. Objective:_____

      Evaluation Indicator:_____

   b. Objective:_____

      Evaluation Indicator:_____

2. Goal:_____

   _____

   a. Objective:_____

      Evaluation Indicator:_____

   b. Objective:_____

      Evaluation Indicator:_____

5 5:

3. Goal:_____

_____

    a. Objective:_____

       Evaluation Indicator:_____

    b. Objective:_____

       Evaluation Indicator:_____

4. Goal:_____

_____

    a. Objective:_____

       Evaluation Indicator:_____

    b. Objective:_____

5. Goal:_____

_____

    a. Objective:_____

       Evaluation Indicator:_____

    b. Objective:_____

       Evaluation Indicator:_____

B. PLANS FOR RETENTION

1. Goal:_____

   _____

   a. Objective:_____

      Evaluation Indicator:_____

   b. Objective:_____

2. Goal:_____

   _____

   a. Objective:_____

   Evaluation Indicator:_____

   b. Objective:_____

      Evaluation Indicator:_____

3. Goal:_____

   _____

   a. Objective:_____

      Evaluation Indicator:_____

   b. Objective:_____

C. PLANS FOR RECRUITMENT

a. GENERAL RECRUITMENT

1. Goal:_____

_____

    a. Objective:_____

       Evaluation Indicator:_____

    b. Objective:_____

       Evaluation Indicator:_____

2. Goal:_____

_____

    a. Objective:_____

       Evaluation Indicator:_____

    b. Objective:_____

       Evaluation Indicator:_____

3. Goal:_____

_____

    a. Objective :_____

       Evaluation Indicator:_____

    b. Objective:_____

       Evaluation Indicator:_____

b. **UNDERREPRESENTED POPULATIONS**

1. Goal:_____

_____

    a. Objective:_____

       Evaluation Indicator:_____

    b. Objective:_____

       Evaluation Indicator:_____

2. Goal:_____

_____

    a. Objective:_____

       Evaluation Indicator:_____

    b. Objective:_____

       Evaluation Indicator:_____

3. Goal:_____

_____

    Evaluation Indicator:_____

    a. Objective:_____

       Evaluation Indicator:_____

    b. Objective:_____

       Evaluation Indicator:_____

C. GOALS FOR STUDENTS

Based on previously identified changes in programs/services to be offered, what is your goal for the number of student enrollments you will be serving in the upcoming years? (Estimate for Fall Semester only) Complete as appropriate for Student Services Programs.

	Estimate Number of Enrollments	Load WSCH/FTE
Students Served in Fall 1991 (Actual)	_____	_____
Students Expected to Serve this Fall 1992	_____	_____
Students To Be Served: Goal for Fall 1993	_____	_____
Fall 1994	_____	_____
Fall 1995	_____	_____

D. GOALS FOR STAFF

How many FTE staff members do you feel you will need to conduct your planned program in the next few years? (number for total academic year including summer)

Indicate number of FTE's for full year

	Current 1992-93	1993-94	1994-95	1995-96
Faculty: Full-time	_____	_____	_____	_____
Part-time	_____	_____	_____	_____
Classified Permanent	_____	_____	_____	_____
Classified Hourly	_____	_____	_____	_____
Management/ Administration	_____	_____	_____	_____
Coordination Time	_____	_____	_____	_____
Other Reassigned Time	_____	_____	_____	_____
Total FTE	_____	_____	_____	_____
Probable Retirements	_____	_____	_____	_____

E. FACILITIES, EQUIPMENT, AND CURRICULUM

Based on previously identified changes in programs/services to be offered and/or students to be served, will you have specific facility needs/changes in the next few years? Please list and indicate with an "X" the year needed. On a separate, attached page, please indicate, in priority order, specific plan including diagrams and estimate of the cost.

Facility Changes	Program	1993-94	1994-95	1995-96

Based on the previously identified changes in programs/services to be offered and/or students to be served, what do you anticipate will be major equipment expenditures in the upcoming years? List, in priority order, the new equipment needed as part of any facility changes.

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List any changes in curriculum you anticipate in the coming years, noting on a separate narrative page whether they are in General Education, majors requirements or special offerings, and whether an increase in numbers of class sections is indicated, and in which classes.

Curriculum	Program	1993-94	1994-95	1995-96

III. PROJECTED BUDGET

Based on your previously identified changes in programs, services, staff, etc., what do you anticipate your unit budget needs will be over the next few years?

Object Code		Current Budget 1992-93	Proposed Budget 1993-94	Proposed Budget 1994-95	Proposed Budget 1995-96
1000	Faculty Total FTE				
2000	Classified Total FTE				
3000	Employee Benefits	N/A	N/A	N/A	N/A
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5000	Other Operational Expenses				
6000	Capital Outlay				
7000	Other				

GLOSSARY

1. Program Review - to assess an institutional program, considering the results of internal and external assessments that can be used for planning and determining needs.

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10. FTE - full-time teaching equivalency (15 FLC per semester/30 FLC per year).

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    A. Definition of WSCH, Weekly Student Contact Hours

    1. For a given full semester class, WSCH equals the number of students in the class times the number of hours per week the class meets.

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    If 40 students are enrolled in a History course which meets 3 hours per week, the WSCH for that class would be:

    40 x 3 = 120 WSCH.

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2. For an instructor, WSCH equals the sum of the WSCHs for all his/her classes.

<u>Example</u>

The same instructor who taught the History course above also teaches three other sections of History, all of which meet three hours per week, with enrollments of 35, 40, and 45 and Honors Political Science course with 20 students which meets 3 hours per week. The instructor's WSCH would be calculated as follows:

Section 1   40 x 3 = 120
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<u>TOTAL WSCH</u> = <u>540</u>

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This term refers to <u>faculty</u>; there are also full-time equivalent students referred to as FTES (California is in the process of adopting this nomenclature).

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3. As applied to a department, a department's FTE would be the sum of the FTE for each faculty in the department.

<u>Example</u>

A department is composed of 4 full-time faulty, 3 part-timers who teach 3 units, 1 part-timer who teaches 6 units, and 1 who teaches 9 units. The department's FTE would be calculated as follows:

3 part-timers x 3/15 = .60 FTE
1 part-timer x 6/15 = .40 FTE
1 part-timer x 9/15 = .60 FTE
4 full-timers   = <u>4.00 FTE</u>

Total FTE   <u>5.60 FTE</u>

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4. For a division, FTE equals the sum of the FTEs for each department within the division.

C. Definition and Interpretation of WSCH/FTE

WSCH/FTE is a ratio comparing weekly student contact hours generated to full-time faculty necessary to generate that WSCH. This ratio is referred to as load.

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The department in the previous example is found to have generated 2800 WSCH. It has 5.60 FTE faculty. Therefore:

WSCH/FTE = 2800 ÷ 5.60 = 500

12. Expenditures

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Most of the time when we refer to the cost of a class we are referring only to the instructor's salary; i.e., salary cost. Most income-expense ratios in fact compare ADA income to salary cost. However, there are many other costs that one must consider when analyzing whether or not income balances expense.

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STUDENT SERVICES TERMINOLOGY

Matriculation - A Program to help students achieve their educational goals bproviding information and guidance concerning the choices that are available to them. To "matriculate" means "to enroll" and "to admit to membership and privileges." Thus, matriculation is a process which requires a commitment on the part of both the student and the college.

Pre-Collegiate Basic Skills - Courses in reading, writing, computation, learning ski'ls, study skills, and English as a Second Language which are designated as non-degree credit courses.

Exemption - Waiving or deferring a student's participation in orientation, assessment, counseling or advisement.

Student Follow-up - The process of monitoring a student's progress toward his or her educational goals and providing the student with appropriate advice based on the results of such monitoring.

Counseling - 1 FLC is equal to 33 students (30 hours per week on campus for full-time counselors).

Concurrent Student - A student currently attending high school and who has completed his/her sophomore year and has earned and maintained a grade point average of 2.0 or higher in high school may, with authorization, also take a course at a community college.

A.D.A. - Average Daily Attendance - a mathematical formula for computing student attendance to be reported to the State for apportionment purposes.

320 Report - An apportionment attendance report sent to the State three times a year in order to receive funding from the State.

Articulation - An agreement between post-secondary colleges and State colleges and Universities regarding classes that are equivalent and transferable.

G.E. Certificate - A certification that a student has met the general education requirements of the California State University.

Scan Sheets - Computer read forms that are "bubbled" by the faculty.

First Census Enrollment Scan Sheets - A computer generated form listing all officially enrolled students in each class. Instructors are asked to report any students who

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have withdrawn from their class by "bubbling" in a drop date..Positive Attendance - A computer generated form listing all officially registered students in each class. Instructors are asked to report the number of class meetings each students has attended as well as any drop dates.

Academic Renewal - A maximum of two semesters and one summer session of substandard work (less than a 2.0 GPA), not reflective of the students present scholastic level of performance, may be alleviated and disregarded in the computation of grade point average.

Grade Alleviation - A student who has received a grade of D, F, or NC In a course taken at a college of the San Mateo County Community College District may, with authorization, repeat the course for purposes of grade alleviation. On petition to the Office of Admissions and Records, the student may have the grade of the repeated course used in computation of the grade point average. The original grade will remain on the transcript, but will no longer affect the grade point average.

Midterm Deficiency Report - a report completed by the instructor of a class in which the student Is making unsatisfactory progress (D, F, or NC) at Midterm Report Week.

Resident - A person who has lived in California one year and one day prior to the start of the semester and meets eligibility requirements for establishing California residency.

Non-Resident - A person who has not lived in California one year and one day prior to the start of the semester, even though they are a U.S. citizen or legal immigrant. International Students and someone in the U.S. on a temporary visa are also non-residents.

International Student - A legal resident of another country who is in the U.S. temporarily on a F-1 visa, to study.

F-1 Status - A visa for students coming to the U.S. for the sole purpose of studying.

I-20 Form - A certificate of eligibility for nonimmigrant (F-1) student status, for academic and language student.

Student Accident and Health Insurance - Insurance which is available for purchase by eligible SMCCCD students (minimal units required) to deal with acute illnesses or accidents to student and/or immediate family.

Dental Insurance - insurance which is available for purchase by any SMCCCD student to provide evaluation, prophylaxis and treatment of dental programs for student and/or immediate family.